



Requesting a New Project (Client Agency)

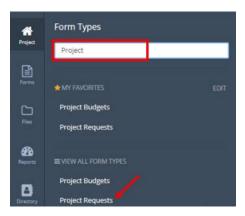
DGS Client Agencies will utilize the **Project Request** form in the **DGS Portfolio** project to submit a request for a new project. Once a Project Request is submitted to DGS, the Client Agency will work with the Executive Program Manager (EPM), or the EPM's designee, to discuss the project, further define and refine the project, and enter additional information to create a Project Statement. The Project Statement can be used to provide details about the project for review and scoring during the CIP Budget Process, or provide key details to the project team to begin project implementation if the project is already funded.

Creating a Project Request

1. Open the **DGS Portfolio** project and click on **Forms** in the navigation menu.



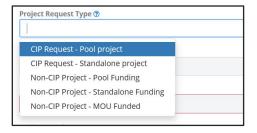
2. In the search field, begin typing **Project** and the form will appear in the forms list. Click **Project Requests** to open the log.



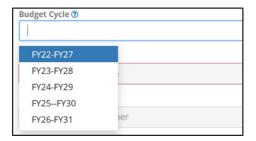
3. Click the **New** button in the upper right corner to create a new Project Request. The **New Project Request** details window will open.



4. Select the **Project Request Type** from the picklist.



5. Select the appropriate **Budget Cycle** from the picklist if the project will need to be submitted for review and approval as part of the CIP. Leave this field blank if the project is funded and will not be part of a CIP submission.



6. Enter the **Project Name** to include the name of the facility/location and the type of work to be performed.

For Example: If you are requesting a new sports complex for Kenilworth, the project name would be **Kenilworth Sports Complex**.

NOTE: Do not abbreviate things like Elementary School as "ES" or Recreation Center as "Rec Center", spell them out. Do not enter the project name in all capital letters.



7. Enter the proposed Project Number(s) if this project is expected to use existing funding.

NOTE: Enter all proposed Project Numbers and their associated amounts, separated by commas if the funding will be split between two or more funding sources (i.e., YY107C-\$1,000,000, YY108C-\$1,000,000). Enter TBD if this is a new unfunded project.



8. Enter the proposed total **Available Funding** amount for the project, if applicable. Leave blank if no funding is currently allocated to this project.

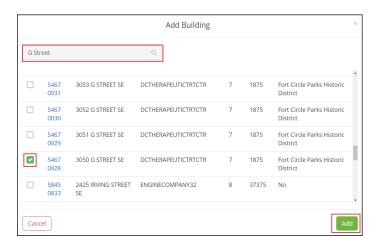


9. Select one or more **Buildings** or locations from the existing list by clicking **Add Existing**. Leave blank if this is new construction with no location in the list.

NOTE: Reach out to your DGS Executive Program Manager if building(s) or site(s) are not in the list. Please DO NOT create a new building or type directly into these fields.



NOTE: Search as needed to find the appropriate building(s), **check the box** next to those to be selected, and click **Add**. Multiple locations/buildings can be selected for projects with multiple sites.

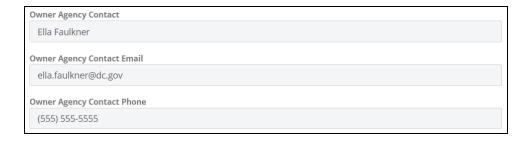


10. Select the appropriate **Owner Agency** from the picklist.



11. Enter the **Owner Agency Contact** Information with the client agency **primary point of contact for the project** including:

Name, Email, and Phone.



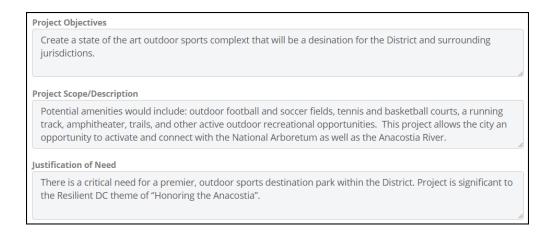
12. Enter **Related Project(s)** separating multiple projects with commas. Related projects are planned or current projects that are ongoing at the same site (i.e. a Rec Center and a School that share the same space/building and are being renovated at the same time)



13. Select the requested Construction Start/Move Out Date and Construction End/Move In Date.



14. Enter the detailed narrative of the **Project Objectives, Project Scope/Description**, and **Justification of Need.**



15. After entering the Justification of Need, click **Save & Share** to save the Project Request and share it with the appropriate EPM Share Group for your DGS Program.



Attach Supporting Documentation



Submit Your Project Request to DGS for Review

1. Initiate the Submit Project Request Workflow by clicking on **Start New** in the Workflows section near the bottom of the record, select the Workflow appropriate for your DGS Program and click on Start Workflow.

